



KNOW-HOW-GUIDE RETAIL EXCALIBUR CONNECTIONS

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RULES

Process

- This process should only be used if you receive an error in Domino and Excalibur Web Lite.
- All proofs must be completed before processing any connection – see Proofs and Identifications policy in Albert.
- This process must not be used for Flex Pay – see Flex Pay policy for guidance.
- All sales must be processed manually in EPOS and Contract Tool must be completed.

Compliance

- Store Leaders must check pricing and device costs are correct as per Pricebook.
- All sales will be subject to validations

Support

- If you need support whilst completing a sale using this process, contact RIO

APPLICATION TYPE GUIDANCE

The screenshot shows a software window titled 'Application Information'. It contains various fields for contract and account details. A dashed line points from the 'Application Type' dropdown menu to a separate list of options.

Application Information Form Fields:

- Agreement: Agreement No. [], Port Intention ☐
- Contract Date: 31/10/2023, Purchase Order: []
- Contract Status Date: 31/10/2023, Contract Print Request: ☐
- Contract Status: CO, NOT REQUIRED
- Conditions Ver. No: 07, EE SERVICE/UPGRADE COM
- Account Type: YC, PRIVATE USER
- Handset Optn: Contract, Paper Reg. ☐
- Application Type: R (selected), REGULAR, POBO ☐
- Sales Entity: AJ32, EE RETAIL
- Store: 04332, ALPHA JULIET 32
- Sales Rep: [], Sales Tel: []
- Existing Account ☐ New Account ☒

Application Type Dropdown Menu:

Type	Description
PRE->POST MGT.	
R	Regular
U	Upgrade
P	Pre Pay Reg
C	Change of Owner
BO	Bulk Order
LF	Load DLR File
PM	Pre->Post Mgt.

i APPLICATION TYPE:
New – 'R'
Add Line – 'R'
PRE to Post – 'PM'
Upgrade – U

i When selecting an Add Line (can also be Pre to Post add line) you must ensure you have also selected 'EXISTING ACCOUNT'

i When completing a brand-new line (can also be Pre to Post), ensure that you have also selected 'NEW ACCOUNT'

i When completing an upgrade, ensure that you have also selected 'EXISTING ACCOUNT'

NEW CONNECTION/ PRE TO POST

The screenshot shows the 'Application Information' form in the Excalibur Web interface. The form is titled 'Application Information' and contains several sections for data entry. The 'Agreement' section includes fields for 'Agreement No.', 'Port Intention' (checkbox), and 'Application Type' (dropdown menu set to 'R' for REGULAR). The 'Contract' section includes 'Contract Date' (31/10/2023), 'Purchase Order' (text field), 'Contract Status Date' (31/10/2023), 'Contract Print Request' (checkbox), 'Contract Status' (dropdown menu set to 'CO'), and 'Conditions Ver. No.' (07). The 'Sales' section includes 'Sales Entity' (AJ32), 'EE RETAIL', 'Store' (04332), 'ALPHA JULIET 32', 'Sales Rep.' (text field), and 'Sales Tel.' (text field). The 'Account' section includes 'Existing Account' (radio button), 'New Account' (radio button, selected), 'Account Type' (YC), 'PRIVATE USER', 'Handset Optn' (Contract), and 'Paper Reg.' (checkbox).

Log into Excalibur Web and click on 'APPLICATION'

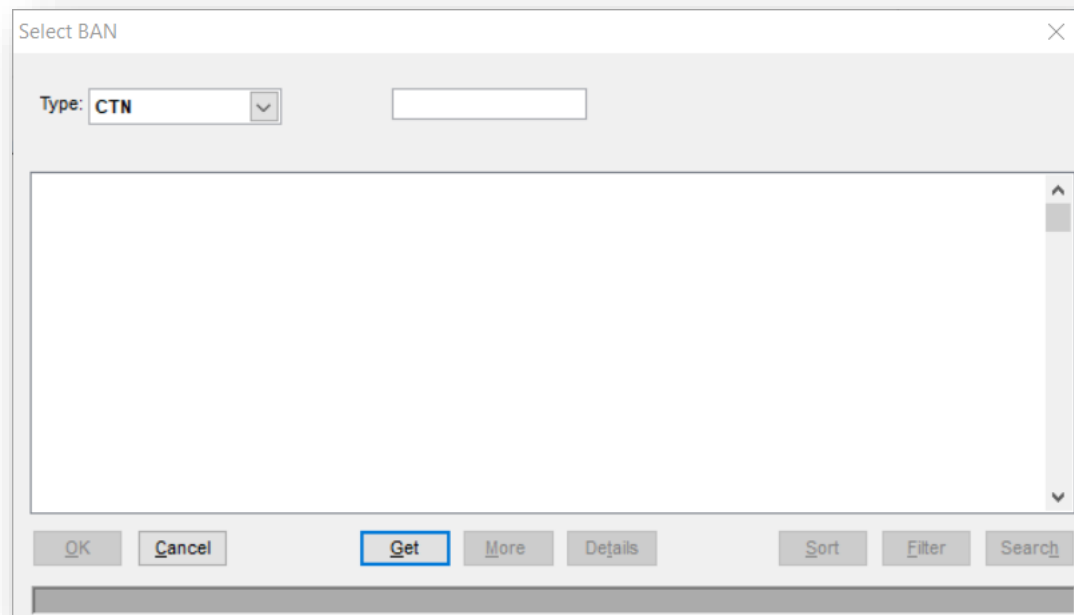
Complete: - Application Type '**R**' (for New) or '**PM**' (P2P)
- Sales Entity/Store Code
- Conditions Version
- Account Type
-Handset Option
-New Account

Once all the required fields have been completed, click on 'OPEN WIZARD' at the top

! Company Owned stores Entity Code: AJ32 / Franchise Stores must use their own store code.

Ensure you enter your store code correctly as the sale will not count

PRE TO POST ONLY



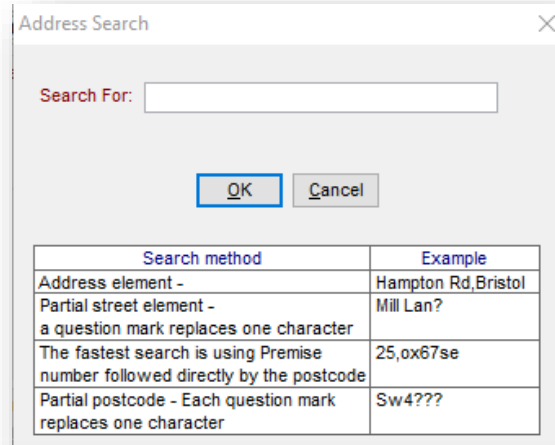
Select BAN

Type: CTN

OK Cancel Get More Details Sort Filter Search

If you are connecting a Pre to Post – a pop-up will appear.
Enter the customer's
PAYG CTN

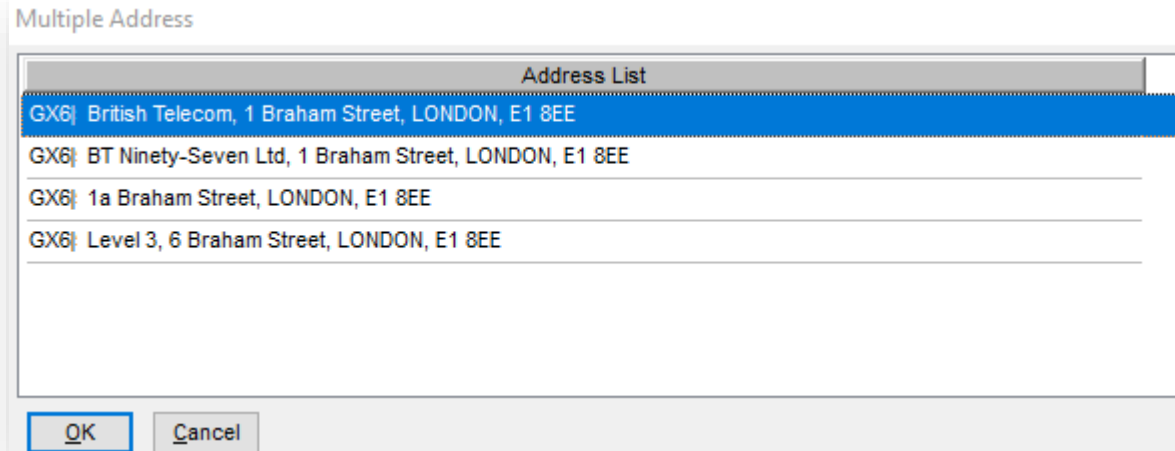
NEW CONNECTION/ PRE TO POST CONT...



Address Search

Search For:

Search method	Example
Address element -	Hampton Rd,Bristol
Partial street element - a question mark replaces one character	Mill Lan?
The fastest search is using Premise number followed directly by the postcode	25,ox67se
Partial postcode - Each question mark replaces one character	Sw4???



Multiple Address

Address List

- GX6| British Telecom, 1 Braham Street, LONDON, E1 8EE
- GX6| BT Ninety-Seven Ltd, 1 Braham Street, LONDON, E1 8EE
- GX6| 1a Braham Street, LONDON, E1 8EE
- GX6| Level 3, 6 Braham Street, LONDON, E1 8EE

A pop-up will appear. Search for the customer's Post Code and select 'OK'

Select the customer's full address from the list and click 'OK'

NEW CONNECTION/ PRE TO POST CONT...

UPGRADE Application Number 286350772 for EE RETAIL

Name + Address

Payment Method

Registered Cards

Credit Check

Product + PP

SIM + CTN

Equipment

Name

Title: MR First: RETAIL

Middle Initial: Last: IMPLEMENTATION

Additional Line

Birth Date: 01/01/1980 Age: 43

Land Line Check

Not Tested

Address

Attention:

Sub premise:

House Name: House #:

Street Line1: Rhydycar Business Park

Street Line2:

City/Posttown: MERTHYR TYDFIL

County: Mid Glamorgan

Post Code:

Country: UK UK

Verified:

Verify

Time At Address: Years: 5 Months: 11 BT Verify

Search

Skip Validations:

Current Address

Previous Address

Personal Details

Proofs

Upgrade

Back

Next

Cancel

Show account

Complete all fields accurately. Ensure to enter the customer's current address and previous address if required

Each tab must be completed (a green tick will show once complete)

REGULAR Application Number 383026085 for EE RETAIL

Name + Address

Coverage Check

Payment Method

Registered Cards

Credit Check

Product + PP

SIM + CTN

Equipment

Name

Title: MR First: RETAIL

Middle Initial: Last:

Additional Line

Birth Date: 01/01/1980 Age: 43

Land Line Check

Not Tested

Proofs

Description

Identity:

Single Proof

Description

AVS:

Current Address

Previous Address

Personal Details

Proofs

Other

Reserve

Activation

Back

Next

Cancel

Show account

In the Proofs tab, select 'AVS' either Debit Card or Credit Card

⚠ Ensure all proof information is completed as per Proof Check Policy requirements within. AVS check is required to run a credit check

NEW CONNECTION/ PRE TO POST CONT...

Proof

Proof validation

Card Details

Customer Contact Method

☒ Chat ☐ Voice

Register card details

☒ Yes ☐ No

Proceed

Confirm Cancel

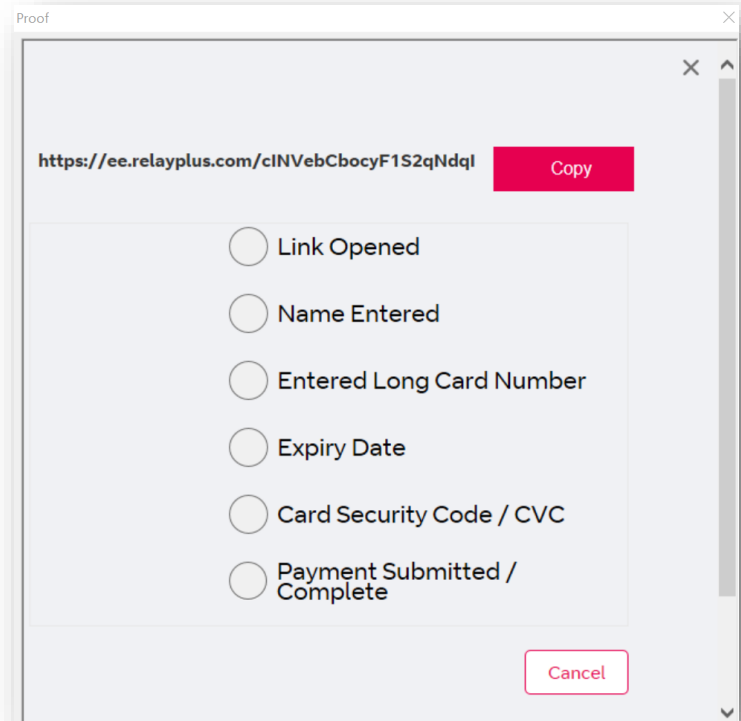
A pop-up will appear asking for the customer's card details for the AVS check

Select 'CHAT'

Ask the customer if they would like their card information to be registered and select accordingly

Click 'PROCEED' when ready

NEW CONNECTION/ PRE TO POST CONT...



The screenshot shows a window titled "Proof" with a close button (X) in the top right corner. Inside the window, the URL <https://ee.relayplus.com/cINVebCbocyF1S2qNdql> is displayed. To the right of the URL is a red button labeled "Copy". Below the URL, there is a list of six steps, each with a radio button and a label:

- ☐ Link Opened
- ☐ Name Entered
- ☐ Entered Long Card Number
- ☐ Expiry Date
- ☐ Card Security Code / CVC
- ☐ Payment Submitted / Complete

At the bottom right of the window is a red button labeled "Cancel".

Select 'COPY' to copy the link

Keep this screen open

NEW CONNECTION/ PRE TO POST CONT...

The image displays two sequential screenshots of a web application interface titled 'Hub'.

Top Screenshot: The 'Template Messages' page is shown. It includes a search bar with the placeholder 'Search BT...', an 'Advanced' search option, and a 'Hub Home' button. The main heading is 'Template Messages', followed by a 'Search' section with a label 'MSISDN:' and an input field. An 'Open' button is located below the input field.

Bottom Screenshot: The 'Template Messages' page is shown again, but now with 'MSISDN: 079' entered in the search field. Below the search bar, there is a 'Search Templates' section with a filter set to 'payment'. A list of templates is displayed, including 'EE Booklet - Home Bill Explained', 'EE Booklet - Payment Options', 'EE Mobile Pay by BACS', 'Fast Payment PAYM', 'Payment Auth. Code', 'Proof of Payment Required - Email', 'Proof of Payment Required - Post', and 'Secure Payment Link'. The 'Secure Payment Link' template is selected. To the right, a 'Secure Payment Link' section shows a 'From:' dropdown set to 'EE' and a text area containing a message template with a redacted secure payment URL. Below the text area are 'Copy to Clipboard' and 'Send SMS' buttons.

Open Advisor Hub and
Launch 'TEMPLATE MESSAGES'

Enter the customer's existing CTN
and click 'OPEN'

Click 'BILLING & PAYMENTS' and
'PAYMENT'. Select 'SECURE
PAYMENT LINK'

Paste the URL link
Excalibur provided into
the template replacing
secure_payment_url

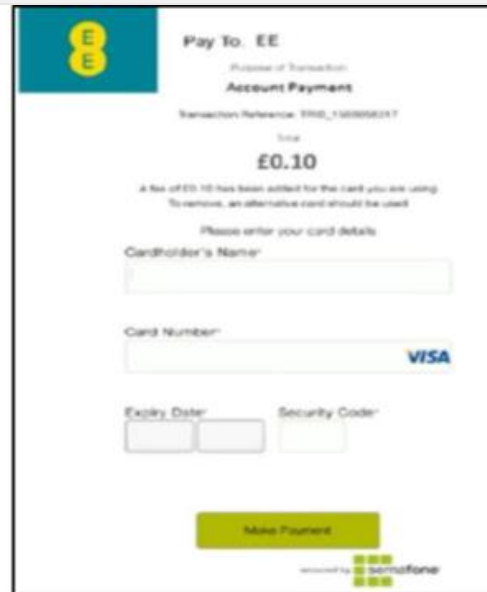
Click 'SEND SMS'

NEW CONNECTION/ PRE TO POST CONT...

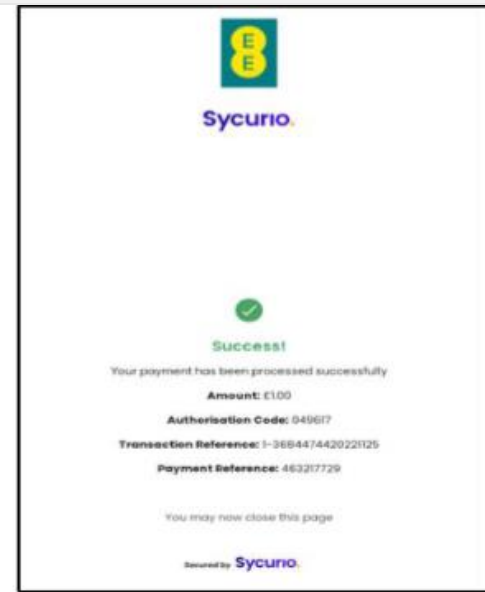
Hi from EE. We're sending you this message so we can take a secure payment. Please click the secure link below and follow the instructions:

<https://ee.relayplus.com/yfgmVYYoO4WPMYq8u5Ev>

This link is unique to your current transaction, and it can only be used once. It will also timeout in 10 minutes. Once submitted, we'll process the payment and will tell you when it's successful. If you're not expecting this message and/or you're not currently in contact with EE please call [150](tel:150) immediately.



The screenshot shows the EE payment interface. At the top, it says 'Pay To: EE' and 'Purpose of Transaction: Account Payment'. The transaction reference is 'E102_1100000217' and the total is '£0.10'. A note states: 'A fee of £0.10 has been added for the card you are using. To remove, an alternative card should be used.' Below this, it asks the user to 'Please enter your card details'. The form includes fields for 'Cardholder's Name', 'Card Number' (with a VISA logo), 'Expiry Date', and 'Security Code'. A green 'Make Payment' button is at the bottom, with a 'powered by salfordphone' logo.



The screenshot shows the Sycuro success page. It features the Sycuro logo at the top. A green checkmark icon is followed by the word 'Success!'. The text confirms: 'Your payment has been processed successfully'. It lists the 'Amount: £1.00', 'Authorisation Code: 049617', 'Transaction Reference: 1-368447442022125', and 'Payment Reference: 463217729'. At the bottom, it says 'You may now close this page' and 'powered by Sycuro'.

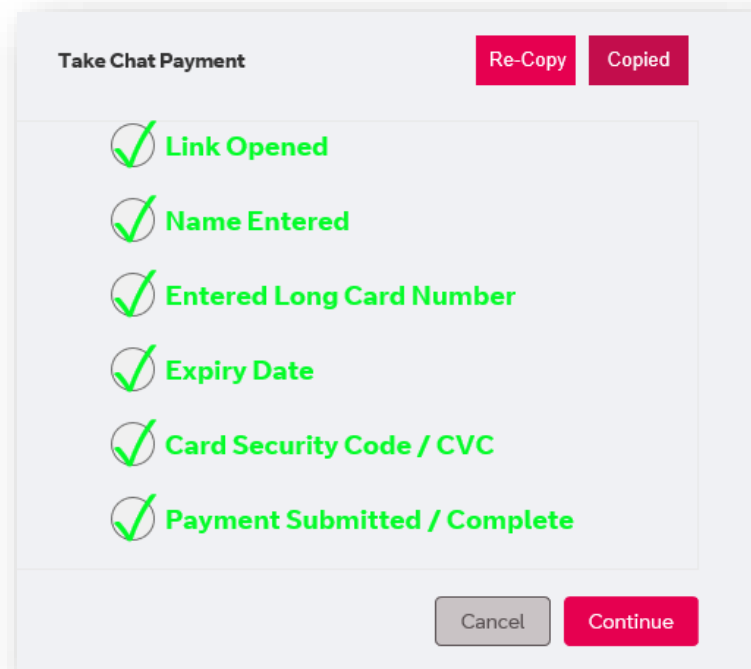
The customer will receive an SMS with a payment link

Advise the customer to click on the link and enter their card details to process the payment

! The customer must enter card details themselves on their own device. Under no circumstances can you view or enter any card details or use a store device to process a payment

i Please advise the customer that they are not paying for anything at this point, except £1 in and out for the AVS check

NEW CONNECTION/ PRE TO POST CONT...



Take Chat Payment

Re-Copy Copied

- ✓ Link Opened
- ✓ Name Entered
- ✓ Entered Long Card Number
- ✓ Expiry Date
- ✓ Card Security Code / CVC
- ✓ Payment Submitted / Complete

Cancel Continue

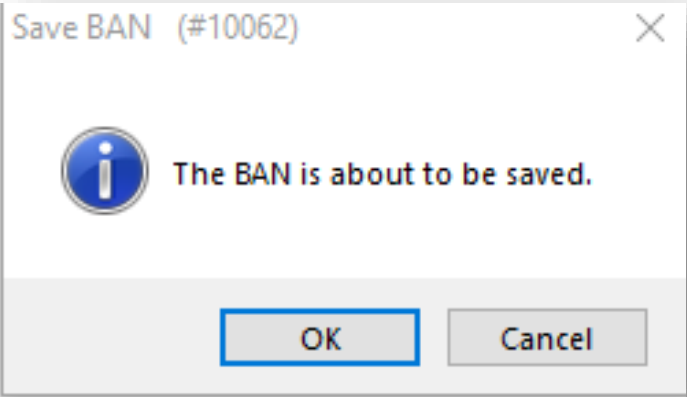
If the AVS check was successful, then the customer will receive a 'SUCCESSFUL' message on their device

The screen you had open will turn green and each section will have a green tick. Click 'CONTINUE' to proceed

i Please note – the AVS card must match the customer's registered address

i If the customer's AVS was unsuccessful then a pop-up will appear to say the payment was declined – you will be unable to complete the connection

NEW CONNECTION/ PRE TO POST CONT...



A pop-up will appear – click 'OK' to save the new BAN

If any matching BAN's appear at this point, you must check these to ensure it is not one of your customer's existing accounts

Existing BANs matching customer details entered

Name	Address	Date Of Birth	Ban Status
TEST, MR ACCEPTANCE	1 braham street E1 8EE	02/02/2002	Closed
TEST, MR ACCEPTANCE	1 Braham Street E1 8EE	10/10/1988	Open
TEST, MR ACCEPTANCE	1 braham street E1 8EE	08/09/1993	Open
TEST, MR ACCEPTANCE	1 Braham Street E1 8EE	10/10/1988	Open

If there are no matching BAN's – click 'NO MATCH'

If the customer is already with us – you must process the connection as an Additional Line

NEW CONNECTION/ PRE TO POST CONT...

REGULAR Application Number 383211034 for EE RETAIL

	✓ Name + Address	Credit Request Requested CTNs: 1 Submit
	✓ Coverage Check	
	✓ Payment Method	
	✓ Registered Cards	
	→ Credit Check	

Credit Results

Status:

Credit Results

Status:

Credit Results

Status:

Select the number of lines the customer would like to request (a credit check is run at this point).
click 'SUBMIT'

The next screen will show three possible results:

1. Decline
2. Refer
3. Accept

If the customer gets accepted,
click 'NEXT'

i If the customer gets a 'REFER' status, then most likely additional information will be required – check the notes on the account

NEW CONNECTION/ PRE TO POST CONT...

Usage Payment

Prepay

Postpay

OK

Price Plan Finder

Price Plan: X23IPU23

Description:

MRC Range:

Data Allowance

Units:

Any

MB

GB

TB

Unlimited

Range:

Filter

Reset

Price Plan	Description	Data Allowance	Product
X23IPU23	All Rounder iP Unl £96	UNLIMITED	CR24

Once accepted,
a pop-up will appear – select
'POSTPAY' and click 'OK'

Enter the tariff code and click
'FILTER'

NEW CONNECTION/ PRE TO POST CONT...

Available SOC's:

Price Plan Regular SOC's Change PP

Soc Description: RC Range:

	lv	SOC	SOC Description	RC/OC	RC**	Deposit	Sale Eff Date	Si		
+	P	C	X23IPU23	All Rounder IP Uni £96	Postpay	✓	96.00	0.00	16/06/2023	0

PP Related Services:

	lv	SOC	SOC Description	RC/OC	RC**	Deposit	Risk Sale Eff		
+	1*	S	C+UGCACCE:Moderate Content Lock	Postpay	✓	0.00	0.00	N	30/10/2
+	1*	S	C ALERTLOAL:Opt-In Low Allowance (PA	Postpay	✓	0.00	0.00	N	30/01/2
+	1*	S	C ALERTUSED:Opt-In Out Of Allowance (F	Postpay	✓	0.00	0.00	N	30/01/2
+	1*	D	C DISC0.50	Postpay	✓	0.50	0.00	N	04/01/2
+	1*	D	C DISC1.00	Postpay	✓	1.00	0.00	N	04/01/2
+	1*	D	C DISC10.00	Postpay	✓	10.00	0.00	N	04/01/2
+	1*	D	C DISC2.50	Postpay	✓	2.50	0.00	N	04/01/2
+	1*	D	C DISC20.00	Postpay	✓	20.00	0.00	N	04/01/2

Postpay Information

Deposit: £0.00 ...

OC**: £0.00 ...

Payment Option

Usage: Postpay

OK Cancel All ETR Zoom

From the list, select the correct tariff and add to basket

i Remember to double check you have added the correct plan. In this section you may also add any Insurance, Spend Cap and other services the customer has opted in for

UPGRADE Application Number 383172434 for EE RETAIL

Product Code: CR24 EE Core 24 Mth

Postpay Information Deposit: £0.00 ... OC: £0.00 ... Discard Offer

Commitment Month: 24 Start: 06/11/2023 End: 06/11/2025 ... Usage Payment Option: Postpay

Activation Date: 06/11/2023 Reason: NR Admin Fee: £0.00 ... PP Services

Price Plan & RC/OC Code: X23IPU23 Desc: All Rounder IP Uni Postpay Rec. connection: £0.00 Features Get Offer

Services

	lv	SOC	SOC Description	RC/OC	Effective	Expires	RC
+	1*	S	C+UGCACCE:Moderate Content Lock	Postpay	06/11/2023	00/00/0000	0
+	1*	S	C ALERTUSED:Opt-In Out Of Allowance	Postpay	06/11/2023	00/00/0000	0
+	1*	D	C DISC10.00	Postpay	06/11/2023	00/00/0000	10

Select HBB available packages

Upgrade < Back Next > Cancel Show account

Click 'NEXT'

! Under no circumstances should discounts be applied here. This will be monitored and validated

NEW CONNECTION/ PRE TO POST CONT...

Equipment

IMEI: - - -

Model:

Type:

Manufacturer:

Premium: Manual: €0.00 Until: 01/01/1900

[Launch Compass](#)

Offer Info Add To Plan

Ownership

SP ☐ STAFF PHONE

Old Equipment

IMEI: 0000000000000000 Ownership: STAFF PHONE

Activate < Back Next > Cancel Show account

Enter the IMEI of the new device you are connecting



This will be greyed out if you have selected a SIM Only connection

Select 'ACTIVATE'

A URN will be provided, ensure to make a note of this for Contract Tool

CONNECTIONS WITH DEPOSITS

The screenshot shows a software interface for equipment activation. On the left is a sidebar with a list of steps: 'Name + Address' (with a checkmark and 'Address' in red), 'Payment Method' (with a checkmark), 'Registered Cards' (with a checkmark and 'CME' logo), 'Credit Check' (with a checkmark), 'Product + PP' (with a checkmark), 'SIM + CTN' (with a checkmark), and 'Equipment' (with a right-pointing arrow). The main area contains several input fields: 'Equipment' section with 'IMEI' (three dashes), 'Model', 'Type', 'Manufacturer', 'Premium' (empty), 'Manual' (£0.00), and 'Until' (01/01/1900); 'Offer Info' and 'Add To Plan' buttons; a 'Launch Compass' link; 'Ownership' section with a dropdown set to 'SP' and a 'STAFF PHONE' field; and 'Old Equipment' section with 'IMEI' (0000000000000000) and 'Ownership' (STAFF PHONE). At the bottom are buttons for 'Activate', '< Back', 'Next >', 'Cancel', and 'Show account'.



If a deposit is required - when you click 'ACTIVATE' a pop-up will appear asking for payment.

To pay the deposit follow steps from pages 9-13

Once the deposit has successfully been paid, the URN will be generated on this screen



ADDITIONAL LINE – REGULAR / PRE TO POST

Stage 2

ADDITIONAL LINE – REGULAR / PRE TO POST

The screenshot shows the 'Application Information' form in the Excalibur Web application. The form is divided into several sections: 'Agreement', 'Contract', 'Account', and 'Customer Search'. The 'Agreement' section includes fields for 'Agreement No.', 'Port Intention', 'Application Type' (set to 'REGULAR'), and 'POBO'. The 'Contract' section includes 'Contract Date' (28/11/2023), 'Purchase Order', 'Contract Status Date' (28/11/2023), 'Contract Print Request', 'Contract Status' (CO), 'Conditions Ver. No.' (07), 'Sales Entity' (AJ32), 'Store' (0000), 'Sales Rep', and 'Sales Tel'. The 'Account' section includes 'Existing Account' (selected), 'Account No.', 'Name', 'Handset Optn' (Contract), 'New Brand', and 'Paper Reg'. The 'Customer Search' section includes a 'Type' dropdown (set to 'CTN') and a search field. Below the search field is a table with columns: BAN, Account Type, Brand ID, Ban Status, BAN Status Date, CTN Status, CTN Status Date, Customer Name, and Customer Address. The table is currently empty. A 'Get' button is located at the bottom right of the form.

BAN	Account Type	Brand ID	Ban Status	BAN Status Date	CTN Status	CTN Status Date	Customer Name	Customer Address
-----	--------------	----------	------------	-----------------	------------	-----------------	---------------	------------------

Log into Excalibur Web and click on 'APPLICATION'

Complete: - Application Type '**R**' (for New) or '**PM**' (P2P)
- Sales Entity/Store Code
- Conditions Version
- Account Type
-Handset Option
-New Account

Enter the customer's existing CTN and click 'GET'

! Company Owned stores Entity Code: AJ32 / Franchise Stores must use their own store code.

Ensure you enter your store code correctly as the sale will not count

ADDITIONAL LINE – REGULAR / PRE TO POST

open wiz... Reset Wi... Menu

Application Information

Agreement

Agreement No: Port Intention ☐ Application Type: R REGULAR POBO ☐

Contract Date: 28/11/2023 Purchase Order: Sales Entity: AJ32 EE RETAIL

Contract Status Date: 28/11/2023 Contract Print Request: ☐ Upg ☐ Mig ☐ Store: 0000 Default Dealer

Contract Status: CO NOT REQUIRED Sales Rep: Sales Tel:

Conditions Ver. No: 07 EE SERVICE/UPGRADE COI

☒ Existing Account Account No: 20 New Brand ☐

☐ New Account Name: MR RETAIL IMPLEMENTATION Handset Optn: Contract Paper Reg. ☐

Customer Search

Type: CTN 07:-----

BAN	Account Type	Brand ID	Ban Status	BAN Status Date	CTN Status	CTN Status Date	Customer Name	Customer Address
201570984	Private User	N	Open	06/12/2022	Active	06/12/2022	MR RETAIL IMPLEMENTATION	Rhydyar Business Park Mid Gl

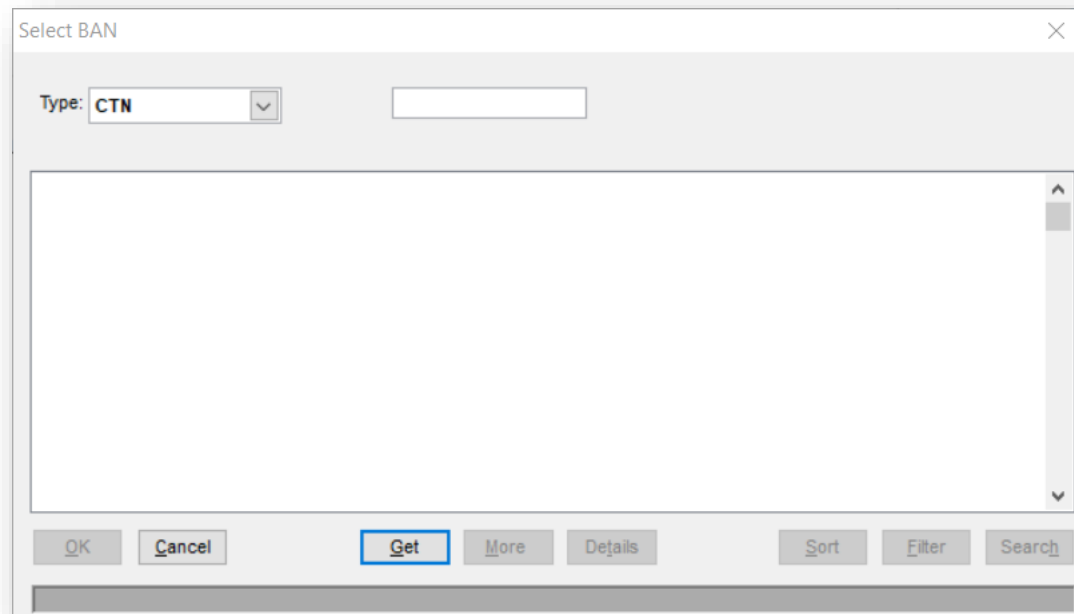
Get

Select 'NEW BRAND'

Click 'OPEN WIZARD' at the top

A pop-up will appear –
click 'NO'

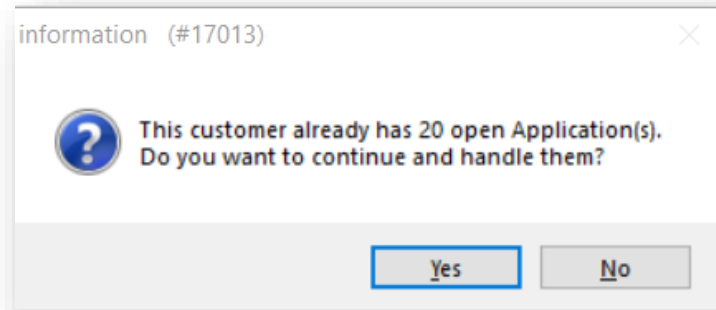
PRE TO POST ONLY



The screenshot shows a 'Select BAN' dialog box with a title bar containing a close button (X). Inside the dialog, there is a 'Type:' label followed by a dropdown menu currently set to 'CTN'. To the right of the dropdown is an empty text input field. Below these elements is a large, empty rectangular area with a vertical scrollbar on the right side. At the bottom of the dialog, there is a row of buttons: 'OK', 'Cancel', 'Get' (which is highlighted with a blue border), 'More', 'Details', 'Sort', 'Filter', and 'Search'.

If you are connecting
a Pre to Post – a pop-up will
appear.
Enter the customer's PAYG CTN

ADDITIONAL LINE – REGULAR / PRE TO POST CONT...



A pop-up will appear – click 'OK'

REGULAR Application Number 383026085 for EE RETAIL

→

Name + Address

Address

✓

Coverage Check

✓

Payment Method

✓

Registered Cards

✓

Credit Check

Product + PP

SIM + CTN

Equipment

Name

Title: MR First: RETAIL

Middle Initial: Last

Additional Line

Birth Date: 01 Age:

Land Line Check

Not Tested

Proofs

Description

Identity: Stage 1

Single Proof

Description

AVS:

✓ Current Address

✓ Previous Address

✓ Personal Details

✓ Proofs

✓ Other

Reserve

Activation

< Back

Next >

Cancel

Show account

i The Name, Address, Payment Method & Registered Cards sections will be pre-filled as they are already an existing customer

For Proofs, select 'STAGE 1' and provide the required proof

! Ensure all proof information is completed as per Proof Check Policy requirements

ADDITIONAL LINE – REGULAR / PRE TO POST CONT...

Usage Payment

☐ Prepay

☒ Postpay

OK

Price Plan Finder

Price Plan: X23IPU23

Description:

MRC Range:

Data Allowance

Units:

☒ Any

☐ MB

☐ GB

☐ TB

☐ Unlimited

Range:

Filter

Reset

Price Plan	Description	Data Allowance	Product
X23IPU23	All Rounder iP Unl £96	UNLIMITED	CR24

A pop-up will appear – select 'POSTPAY' and click 'OK'

Enter the tariff code and click filter

ADDITIONAL LINE - REGULAR / PRE TO POST CONT...

Available SOC's For Sale Of BAN: 201570984

Available SOC's: Price Plan Regular SOC's Change PP

Soc Description: RC Range:

	lv	SOC	SOC Description	RC/OC	RC**	Deposit	Sale Eff Date
+	P	C	X23IPU23 All Rounder iP Uni £96	Postpay	96.00	0.00	16/08/2023

PP Related Services:

	lv	SOC	SOC Description	RC/OC	RC**	Deposit	Risk Sale Eff
+	1st	S	C +UGCACCE: Moderate Content Lock	Postpay	0.00	0.00	N 30/10/2
+	1st	S	C ALERTLOA: Opt-In Low Allowance (PA)	Postpay	0.00	0.00	N 30/01/2
+	1st	S	C ALERTUSED: Opt-In Out Of Allowance (F)	Postpay	0.00	0.00	N 30/01/2
+	1st	D	C DISC0.50 £0.50	Postpay	0.50	0.00	N 04/01/2
+	1st	D	C DISC1.00 £1.00	Postpay	1.00	0.00	N 04/01/2
+	1st	D	C DISC10.00 £10.00	Postpay	10.00	0.00	N 04/01/2
+	1st	D	C DISC2.50 £2.50	Postpay	2.50	0.00	N 04/01/2
+	1st	D	C DISC20.00 £20.00	Postpay	20.00	0.00	N 04/01/2

Product Code: CR24 EE Core 24 Mth

Selected Services:

Postpay Information
Deposit: £0.00
OC: £0.00

Payment Option
Usage: Postpay

OK Cancel All ETR Zoom

From the list, select the correct tariff and add to basket

i Remember to double check you have added the correct plan. In this section you may also add any Insurance, Spend Cap and other services that the customer has opted in for

UPGRADE Application Number 383172434 for EE RETAIL

Product Code: CR24 EE Core 24 Mth

Postpay Information
Deposit: £0.00
OC: £0.00

Commitment
Month: 24 Start: 06/11/2023 End: 06/11/2025

Activation
Date: 06/11/2023 Reason: NR

Price Plan & RC/OC
Code: X23IPU23 Desc: All Rounder iP Ur Postpay

Services

	lv	SOC	SOC Description	RC/OC	Effective	Expires	RC
+	1st	S	C +UGCACCE: Moderate Content Lock	Postpay	06/11/2023	00/00/0000	0.
+	1st	S	C ALERTUSED: Opt-In Out Of Allowance	Postpay	06/11/2023	00/00/0000	0.
+	1st	D	C DISC10.00 £10.00	Postpay	06/11/2023	00/00/0000	10.

Select HBB available packages

Upgrade < Back Next > Cancel Show account

Click 'NEXT'

ADDITIONAL LINE – REGULAR / PRE TO POST CONT...

✓ Name + Address
Address

✓ Payment Method

✓ Registered Cards

✓ Credit Check

✓ Product + PP

→ SIM + CTN

Equipment

SIM Attributes
SIM serial no.:
Description:
Brand:
Pin 1: Pin 2:
Puk 1: Puk 2:
Digital QR Code Details:

CTN Allocation
☐ Automatic
☒ Manual
☐ Paired Number

CTN Options
☒ Primary

CTN Attributes
CTN / Pattern :
Number Location : G01 GENERAL
Primary CTN :
Secondary

Phone Number **Charge**

EID:

Reset CTN Additional Info

< Back Next > Cancel Show account

Enter the new EE PAYM SIM CTN

Enter the SAVY check reference
and click 'NEXT'

Enter the IMEI of the new device
(if you are only connecting a SIM
Contract then this will be greyed
out)

Click 'ACTIVATE'. The URN will be
generated – make a note of
this for Contract tool

✓ Name + Address
Address

✓ Payment Method

✓ Registered Cards

✓ Credit Check

✓ Product + PP

→ Equipment

Equipment
IMEI:
Model:
Type:
Manufacturer:
Premium: Manual: £0.00 Until: 01/01/1900
[Launch Compass](#)

Offer Info Add To Plan

Ownership
SP STAFF PHONE

Old Equipment
IMEI: 0000000000000000 Ownership: STAFF PHONE

Activate < Back Next > Cancel Show account

CONNECTIONS WITH DEPOSITS

The screenshot shows a software interface for equipment activation. On the left is a vertical sidebar with icons and labels: 'Name + Address' (with a red 'Address' label), 'Payment Method', 'Registered Cards', 'Credit Check', 'Product + PP', 'SIM + CTN', and 'Equipment' (which is highlighted with a right-pointing arrow). The main area contains several input fields: 'Equipment' section with 'IMEI' (three dashes), 'Model', 'Type', and 'Manufacturer'; 'Premium' and 'Manual' (set to £0.00) with an 'Until' date of 01/01/1900; a 'Launch Compass' link; 'Offer Info' and 'Add To Plan' buttons; 'Ownership' section with a dropdown set to 'SP' and a 'STAFF PHONE' label; and 'Old Equipment' section with 'IMEI' (0000000000000000) and 'Ownership' (STAFF PHONE). At the bottom are buttons for 'Activate', '< Back', 'Next >', 'Cancel', and 'Show account'.



If a deposit is required for the connection, when you click 'ACTIVATE' a pop-up will appear asking for payment.

To pay the deposit follow steps from pages 9-13

Once the deposit has successfully been paid, the URN will be generated on this screen

VERSION CONTROL

Version	Date	Reason for change	Owner of change
1.0	23/11/23	Document Creation	Nargis Mohamed